



2017 Annual Survey

Members Feedback

October 18-20, 2017



Feedback Items

- Response
- Top Legislative, Environmental, Energy, and Technical Issues
- Top Member Services
- Major Benefits of Membership
- Areas That Need Improvement
- Things Would Like To See Added



Response

- 28 Respondents (32% of Members)
- Response Breakdown
 - 16 Actives (59%)
 - Chemicals: 3
 - Food: 6
 - Forest Products: 2
 - Manufacturing (consumer goods): 2
 - Metals: 1
 - Utilities (CHP/District Energy/IPP): 2
 - 6 Associates (13%)
 - 2 Universities (14%)



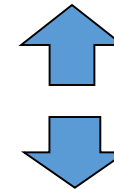
2017 Annual Survey Results Summary

- Legislative Issues
 - Industrial Energy Policy Moved Up
 - Regulatory Overreach Reform & Streamlining Moved Down
- Environmental Regulatory Issues
 - Environmental Litigation and Water Issues Moved Up
 - BMACT Slate of Rules Moved Down
- Energy Regulatory Issues
 - National Energy Strategy and Fuels Moved Up
 - Natural Gas Supply Moved Down
- Technical Interests and Concerns
 - Energy Efficiency, Safety and Burners Moved Up
 - CEMS Moved Down
- Member Services
 - Annual Meeting Moved Up
 - Industry Issue Identification Moved Down



2017 Annual Survey Results Legislative Issues

Clean Air Act Review & Amendments	4.71
Environmental Issues Support	4.42
Energy & Environmental Regulatory Oversight	4.21
Industrial Energy Policy	4.21
Regulatory Overreach Reform & Streamlining	4.07
Energy Efficiency	3.85
Clean Water Act Amendments	3.85
Global Climate Change	3.14
Thermal Energy Support	3.14
Fuel Supply/Flexibility	2.92



New





2017 Annual Survey Results Environmental Regulatory Issues

NAAQS	4.42	
Environmental Litigation	4.21	↑
Boiler MACT Slate of Rules	4.07	↓
Water Issues	4.03	↑
New Source Review Reform	4.00	↓
EPA Next Generation Enforcement Policy	3.96	New
GHG Regulations	3.92	
Title V Permitting	3.85	↓
Emissions Monitoring	3.53	↑
Ozone Transport SIPs (State SIPs, EGU/non EGU)	3.50	↓



2017 Annual Survey Results Energy Regulatory Issues

National Energy Strategy	4.00	
Combined Heat & Power Cogeneration Opportunities	3.92	
Energy Efficiency	3.85	
Fuels	3.59	
Natural Gas Supply	3.42	
Water Availability	3.23	New
Energy Project Evaluation	3.07	
Corporate Sustainability Support	3.00	
Utility Regulation	2.92	New
National Energy Policy ACT/Permitting	2.85	New



2017 Annual Survey Results Technical Interests & Concerns

Energy Efficiency (condensing economizers, Ideas)	4.14	↑
Emission Control Systems	4.00	↓
Safety	3.85	↑
Combined Heat and Power	3.70	↓
Burners	3.77	↑
CEMS (state-of-the art, upgrades)	3.64	↓
Emissions Monitoring and Reporting	3.61	↓
Boiler Operation and Performance Optimization	3.57	↓
Alternative Fuels	3.37	↓
Performance Benchmarking	3.35	New



2017 Annual Survey Results Member Services

Networking with Other Members	7.88	
Annual Meeting	7.68	↑
Industry Issue Identification	7.64	↓
Email Notices and Reports Distribution	7.64	
Technical Conferences	7.45	↓
Conferences and Meetings	7.33	↓
Committee Meeting Minutes & Summaries	7.29	↓
Response to Request for Information	7.25	↑
Issue Information Availability	7.10	↓
Proceedings and Publications	7.04	New



Summary Owner Feedback Benefits of Membership

- Staying Current on Ever Changing Regulatory, Legislative, and Policy Issues; Environmental Regulations Watchdog
 - Access To:
 - Inner Circle Current Information and Intelligence
 - In-Depth Analysis on Key Environmental, Energy and Technical Issues
 - Technical Information and Expertise (conferences, focus groups/forums, meetings)
- Networking/Interacting w/Peers/Customers/Vendors/Consultants
- Active Advocacy/Involvement & Access to Influence Environmental Regulations; Forum for Making Regulatory Comments
- Having an Organized, Technically Based Voice Addressing Issues of Concern to Our Industry



Areas That Need Improvement

- Conferences:
 - Considers ways to improve BMOP and IECT Conference Offerings
 - BMOP: Smart Manufacturing, IoT, Advanced Monitoring and Diagnostics
 - More Technical Case Studies (O&M, etc.) Especially by Owners (50/50 Owner/Vendor)
 - Increase Attendance and Involvement with CIBO by having Inactive Members Give Case Study Presentations
- Committees
 - Energy Committee
 - Needs More Focus on Current Issues With Natural Gas as Sole Source of Production
 - Emphasis on Conservation of Energy, Efficiency, and Alternate Sources (Especially Cutting Edge)
 - Membership Committee Needs to Appeal to Other Non Power Producing Entities That Would Benefit From CIBO Experience
- Issue with CIBO Information Access and Availability
 - Need searchable on-line database of policy and guidance



Things Members Would Like To See

- Hold a “Train-The-Trainer” Meeting on Higher Logic Program so Members can Train Plant Site Personnel
- Broader Focus on Environmental Topics Impacting Turbines, IC Engines, and Other Combustion Equipment Located at Owners Site
- Develop Operations and Maintenance Areas to include all types of boilers and fuels
- Natural Gas combustion oriented issues and regulations, controls, efficiency, monitoring, operation
- Energy Committee Discussion on Energy Savings Associated with Asset Management
- Maybe Opportunity to Modify NSR if EPA Goes from Clean Power Plan to Unit Energy Efficiency to Reduce GHG
- Benchmarking and Environmental Management Systems
- More Direct Access to Resources (Congress/Sub Committees) That Can Affect the Laws to Improve Our Ability to See CAA and CWA Modifications That Are Industry Focused